



REP300-PC/CA/GM
Projects/Contracts/Grants Reports

June 12, 2013

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REP300-PC, CA & GM Reports

Course Overview

The REP300-PC & GM course covers the delivered GEARS reports and online inquiries that are expected to be the most useful to manage Project Costing, Customer Contracts and Grants activity at the Judiciary. The course includes an explanation of the report or inquiry and how it is used, the navigation to the report in GEARS, the Run Control record that is used to initiate the report or inquiry as well as a sample of the output the report or inquiry will produce.

Project Costing Reports

Note. Reports in PeopleSoft Project Costing that show project transaction data are generated from data in the Project Transactions Reporting table (PC_RPO), which you must populate beforehand.

Project Costing, Reports, Summary, Reporting Options
Project Costing, Utilities, Refresh Summary Tables
Project Costing, Utilities, Refresh Budget Summary Tables

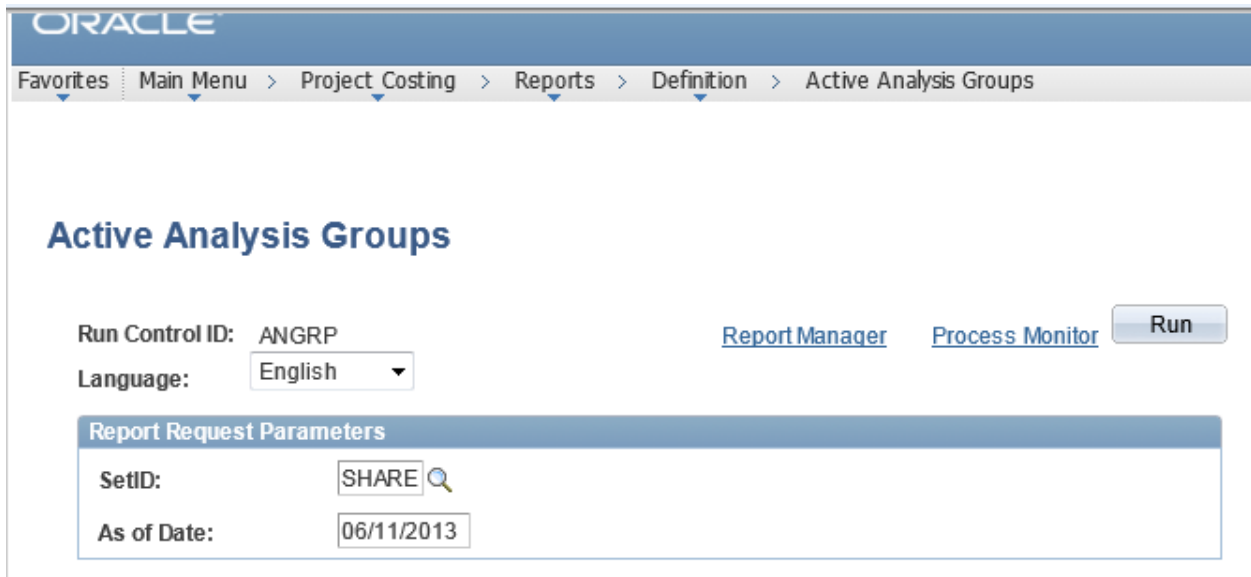
Report ID and Report Name	Description	Navigation	Run Control Page
PCY1030-.RPT Active Analysis Group Definitions	View the definition of each analysis group in the system.	Project Costing, Reports, Definition, Active Analysis Groups, Active Analysis Groups	RUN_PCY1030
PCY8020-.RPT Active Analysis Types by Tableset ID	View a list of all active analysis types for a specific setID as of a specific date.	Project Costing, Reports, Definition, Analysis Types by SetID, Analysis Types by SetID	RUN_PCY8020
PCY5050-.RPT Transaction Level Report	<p>View a list of the activity type, activity ID, source type, category, and subcategory for transactions for all projects or specified projects for a business unit, and optionally for a specific date range or budget, cost, and revenue analysis group.</p> <p>Note. Run the Report Summarization process by transaction date before you run the Transaction Level Report.</p> <p>Additional summarization can be done by utilizing the Report Summarization Options to group fields and even select a value.</p>	<p>Project Costing, Reports, Summary, Transaction Level Report, Transaction Level Report</p> <p>Project Costing, Reports, Summary, Reporting Options</p> <p>Project Costing, Reports, Summary, Report Summarization Options</p>	RUN_PCY5050

PCY1030-.RPT Active Analysis Group Definitions

Explanation: View the definition of each analysis group in the system. Analysis groups consists of multiple analysis types

Navigation: Project Costing, Reports, Definition, Active Analysis Groups, Active Analysis Groups

Run Control:



The screenshot shows the Oracle PCY1030-.RPT Active Analysis Group Definitions report interface. The top navigation bar includes the Oracle logo and a breadcrumb trail: Favorites > Main Menu > Project Costing > Reports > Definition > Active Analysis Groups. The main heading is "Active Analysis Groups". Below this, there are controls for "Run Control ID" (set to ANGRP) and "Language" (set to English). To the right of these controls are links for "Report Manager" and "Process Monitor", and a "Run" button. Below these controls is a section titled "Report Request Parameters" which contains two input fields: "SetID" with the value "SHARE" and a search icon, and "As of Date" with the value "06/11/2013".

ORACLE

Favorites Main Menu > Project Costing > Reports > Definition > Active Analysis Groups

Active Analysis Groups

Run Control ID: ANGRP [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English ▼

Report Request Parameters

SetID:	SHARE 🔍
As of Date:	06/11/2013

Sample Report Output:

Report ID: PCY1030-RPT	PeopleSoft Project Costing	Page No. 1
Run Control ID:	ACTIVE ANALYSIS GROUP DEFINITIONS	Run Date 11/8/2003
Analysis_Group	As Of Date: 1/1/2001	Run Time 6:14:18 PM

Analysis Group	TableSET ID: SHARE
NAME and Description	

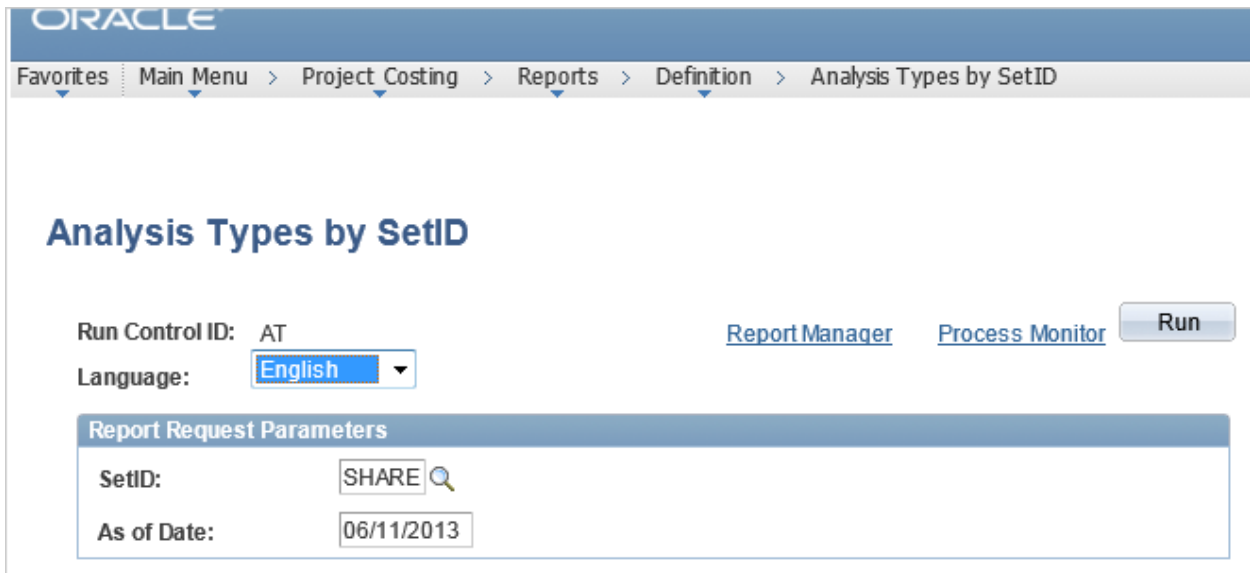
<u>Analysis Type NAME and Description</u>	<u>Quantity Multiplier</u>	<u>Signed Value</u>	<u>Analysis Type Map</u>
<u>ACT</u> <u>Actual Cost</u>			
ACT Actual Cost	1.00	1.00	
PAY Time and Labor Actual	1.00	1.00	
TLA Time and Labor Estimate	1.00	1.00	
<u>ADJST</u> <u>Resource Adjustment</u>			
ACT Actual Cost	1.00	1.00	
NPY No Pay Time and Labor Actual	1.00	1.00	
PAY Time and Labor Actual	1.00	1.00	
<u>ALL</u> <u>All Analysis Types</u>			
ACT Actual Cost	1.00	1.00	
BAJ Billing Adjustment	1.00	1.00	
BD1 Total Cost Budget - Scenario 1	1.00	1.00	
BD2 Total Cost Budget - Scenario 2	1.00	1.00	
BD3 Total Cost Budget - Scenario 3	1.00	1.00	
BD4 Total Cost Budget - Scenario 4	1.00	1.00	
BD5 Total Cost Budget - Scenario 5	1.00	1.00	
BD6 Total Cost Budget - Scenario 6	1.00	1.00	
BD7 Total Cost Budget - Scenario 7	1.00	1.00	
BD8 Total Cost Budget - Scenario 8	1.00	1.00	
BIL Billable Amount	1.00	1.00	
BLD Billed Amount	1.00	1.00	
BRT Billing Retainage	1.00	1.00	
BUD Total Cost Budget	1.00	1.00	
CAJ Cost Share Commitment Adjust	1.00	1.00	
CBA Cost Budget Adjustments	1.00	1.00	
CCA Commitment Adjustments	1.00	1.00	
CCR Cost Share Commitment Reversal	1.00	1.00	
CLS Asset Cost Summary	1.00	1.00	
COM Commitment incl. PO & Subcont	1.00	1.00	
COR Cost of Removal of Asset	1.00	1.00	
CQR CostShare Requisition Reversal	1.00	1.00	
CRQ Cost Sharing Requisition	1.00	1.00	
CRR Cost of Removal Cost Summary	1.00	1.00	
CRV Commitment Reversals	1.00	1.00	
CST Costing (without Contracts)	1.00	1.00	
DEF Billing Deferral	1.00	1.00	
DSC Billing Discount	1.00	1.00	
EMP Employee Time	1.00	1.00	
ESB Bill Estimate	1.00	1.00	
ESC Cost Estimate	1.00	1.00	
FBD Fixed Cost Billed Amount	1.00	1.00	
FCC Completion Cost	1.00	1.00	
FND Funds Distribution	1.00	1.00	
FRV Fixed Cost Revenue Amount	1.00	1.00	
FTC Forecast To Complete	1.00	1.00	
GLE GL Expense	1.00	1.00	
GLR GL Revenue	1.00	1.00	

PCY8020-.RPT Active analysis Types by Tableset ID

Explanation: View a list of all active analysis types for a specific setID as of a specific date.

Navigation: Project Costing, Reports, Definition, Analysis Types by SetID, Analysis Types by SetID

Run Control:



The screenshot shows the Oracle Gears web interface. At the top, the Oracle logo is visible. Below it is a navigation breadcrumb: Favorites > Main Menu > Project Costing > Reports > Definition > Analysis Types by SetID. The main heading is 'Analysis Types by SetID'. Below this, there are controls for 'Run Control ID' (set to 'AT') and 'Language' (set to 'English'). To the right are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below these is a section titled 'Report Request Parameters' containing two input fields: 'SetID' with the value 'SHARE' and a search icon, and 'As of Date' with the value '06/11/2013'.

ORACLE


Favorites > Main Menu > Project Costing > Reports > Definition > Analysis Types by SetID

Analysis Types by SetID

Run Control ID: AT [Report Manager](#) [Process Monitor](#)

Language:

Report Request Parameters

SetID:	<input type="text" value="SHARE"/> 
As of Date:	<input type="text" value="06/11/2013"/>

Sample Report Output:

Report ID: PCY8020-RPT		PeopleSoft Project Costing	Page No. 1
		ACTIVE ANALYSIS TYPES BY TABLESET I.D.	Run Date 11/6/2003
		As Of Date: 1/1/2001	Run Time 5:14:33 PM
TABLESET I.D. = SHARE			
ANALYSIS TYPE	DESCRIPTION	EFFECTIVE DATE	EFFECTIVE STATUS
ACT	Actual Cost	1/1/1900	A
ASP	Express Asset % Distributions	1/1/1900	A
BAJ	Billing Adjustment	1/1/1900	A
BD1	Total Cost Budget - Scenario 1	1/1/1900	A
BD2	Total Cost Budget - Scenario 2	1/1/1900	A
BD3	Total Cost Budget - Scenario 3	1/1/1900	A
BD4	Total Cost Budget - Scenario 4	1/1/1900	A
BD5	Total Cost Budget - Scenario 5	1/1/1900	A
BD6	Total Cost Budget - Scenario 6	1/1/1900	A
BD7	Total Cost Budget - Scenario 7	1/1/1900	A
BD8	Total Cost Budget - Scenario 8	1/1/1900	A
BIL	Billable Amount	1/1/1900	A
BLD	Billed Amount	1/1/1900	A
BRT	Billing Retainage	1/1/1900	A
BUD	Total Cost Budget	1/1/1900	A
CAJ	Cost Share Commitment Adjust	1/1/1900	A
CBA	Cost Budget Adjustments	1/1/1900	A
CBU	Cost Sharing Budget	1/1/1900	A
CCA	Commitment Adjustments	1/1/1900	A
CCR	Cost Share Commitment Reversal	1/1/1900	A
CLS	Asset Cost Summary	1/1/1900	A
COM	Commitment Incl. PO & Subcont	1/1/1900	A
COR	Cost of Removal of Asset	1/1/1900	A
COR	CostShare Requisition Reversal	1/1/1900	A
CRQ	Cost Sharing Requisition	1/1/1900	A
CRR	Cost of Removal Cost Summary	1/1/1900	A
CRV	Commitment Reversals	1/1/1900	A
CST	Costing (without Contracts)	1/1/1900	A
DEF	Billing Deferral	1/1/1900	A
DSC	Billing Discount	1/1/1900	A
EMP	Employee Time	1/1/1900	A
ESB	Bill Estimate	1/1/1900	A
ESC	Cost Estimate	1/1/1900	A
FBD	Fixed Cost Billed Amount	1/1/1900	A
FCC	Completion Cost	1/1/1900	A
FND	Funds Distribution	1/1/2001	A
FRV	Fixed Cost Revenue Amount	1/1/1900	A
FTC	Forecast To Complete	1/1/1900	A
GLE	GL Expense	1/1/1900	A
GLR	GL Revenue	1/1/1900	A
GNT	Grant Reimbursement	1/1/1900	A
NPY	No Pay Time and Labor Actual	1/1/1900	A
OFA	Offset Revenue	1/1/1900	A
OLT	Over Limit	1/1/1900	A
ORD	Order	1/1/1900	A
PAY	Time and Labor Actual	1/1/1900	A
PCA	Profile Adjustment	1/1/1900	A
PCL	Profile Cost Summary	1/1/1900	A
PFS	Proceeds from Sale of Asset	1/1/1900	A
PSD	PST Discount	1/1/1900	A
PSR	Proceeds from Sale Summary	1/1/1900	A
PST	Purch/Sold Time	1/1/1900	A
RAJ	Released Retainage Adjustment	1/1/1900	A
RB1	Revenue Budget 1	1/1/1900	A
RB2	Revenue Budget 2	1/1/1900	A

X PCY5050-.RPT Transaction Level Report

Explanation: View a list of the activity type, activity ID, source type, category, and subcategory for transactions for all projects or specified projects for a business unit, and optionally for a specific date range or budget, cost, and revenue analysis group.

Notes:

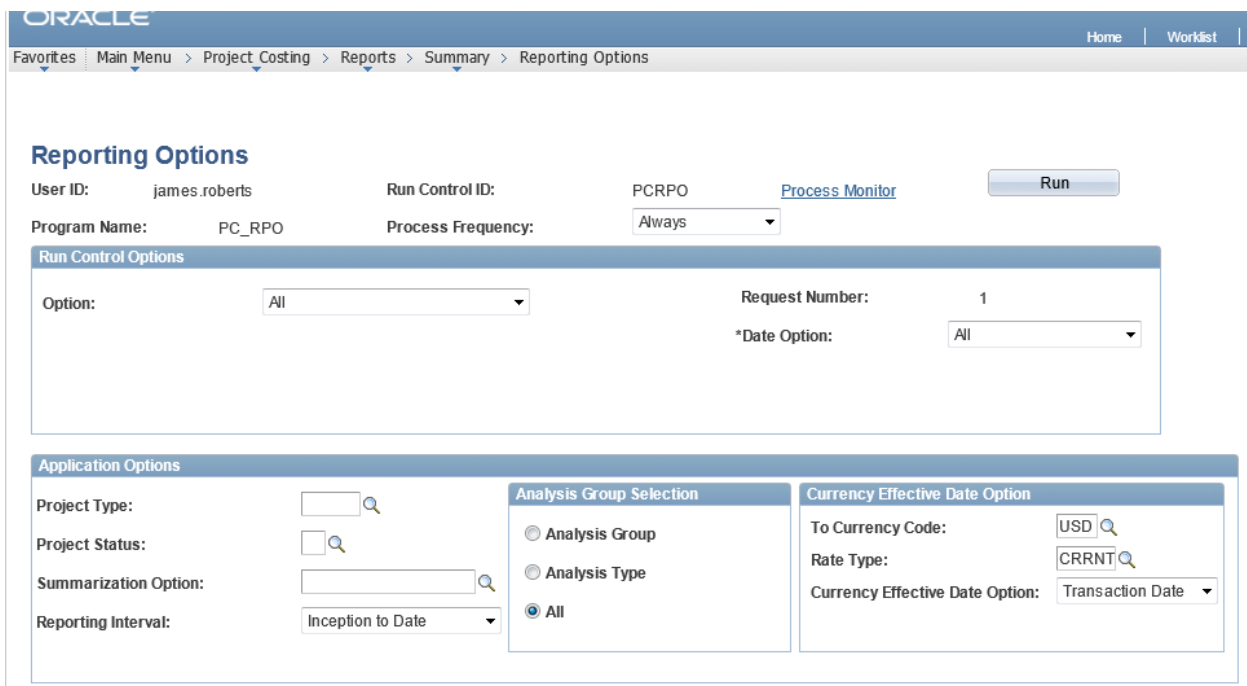
Run the Report Summarization process by transaction date before you run the Transaction Level Report.
>> Project Costing, Reports, Summary, Reporting Options

Additional summarization can be done by utilizing the Report Summarization Options to group fields and even select a value.

>> Project Costing, Reports, Summary, Report Summarization Options

Navigation: Project Costing, Reports, Summary, Transaction Level Report, Transaction Level Report

Run Control:



The screenshot shows the Oracle PCY5050-.RPT Transaction Level Report Run Control page. The page has a blue header with the Oracle logo and navigation links (Home, Worklist). Below the header is a breadcrumb trail: Favorites > Main Menu > Project Costing > Reports > Summary > Reporting Options. The main content area is titled "Reporting Options" and contains several sections:

- User ID:** james.roberts
- Run Control ID:** PCRPO
- Program Name:** PC_RPO
- Process Frequency:** Always
- Run Control Options:**
 - Option:** All
 - Request Number:** 1
 - *Date Option:** All
- Application Options:**
 - Project Type:** [Searchable text field]
 - Project Status:** [Searchable text field]
 - Summarization Option:** [Searchable text field]
 - Reporting Interval:** Inception to Date
 - Analysis Group Selection:**
 - ☐ Analysis Group
 - ☐ Analysis Type
 - ☒ All
 - Currency Effective Date Option:**
 - To Currency Code:** USD
 - Rate Type:** CRRNT
 - Currency Effective Date Option:** Transaction Date

Sample Report Output:

Report ID: PCY5050-RPT		PeopleSoft Project Costing						Page No. 1								
Run Control ID: Trans_Level		Transaction Level Report for Selected Project						Run Date 11/6/2003								
		Transaction Date Range: From 1/1/2001 through 12/31/2003						Run Time 5:11:24 PM								
Activity Type		<div>Project ID: TRAINING Project Description: Training Business Unit: US004</div>						<div>Analysis Group allocation:</div> <table><tr><td>Budget Analysis Grp</td><td>Cost Analysis Grp</td><td>Revenue Analysis Grp</td></tr><tr><td>BUD</td><td>ACT</td><td>PSREV</td></tr></table>			Budget Analysis Grp	Cost Analysis Grp	Revenue Analysis Grp	BUD	ACT	PSREV
Budget Analysis Grp	Cost Analysis Grp										Revenue Analysis Grp					
BUD	ACT										PSREV					
-- Activity																
---- Source Type																
----- Category																
----- SubCategory																
Transaction ID	Trans Date	Anlys Type	Empl ID	Vendor ID	PO ID	Voucher ID	Transaction Description									
Activity Type 00000																
Activity ID TRAIN																
Source Type																
-- Category																
---- SubCategory																
10000782	Nov/30/2003	BUD						20,100,000.00	0.00	0.00						
10000784	Nov/30/2003	ACT						0.00	80,000.00	0.00						
---- Subtotal for SubCategory								20,100,000.00	80,000.00	0.00						
-- Subtotal for Category								20,100,000.00	80,000.00	0.00						
Subtotal for Source Type								20,100,000.00	80,000.00	0.00						
Subtotal for Activity ID TRAIN								20,100,000.00	80,000.00	0.00						
Subtotal for Activity Type 00000								20,100,000.00	80,000.00	0.00						
Total for Project TRAINING								20,100,000.00	80,000.00	0.00						
Total for all Projects								20,100,000.00	80,000.00	0.00						

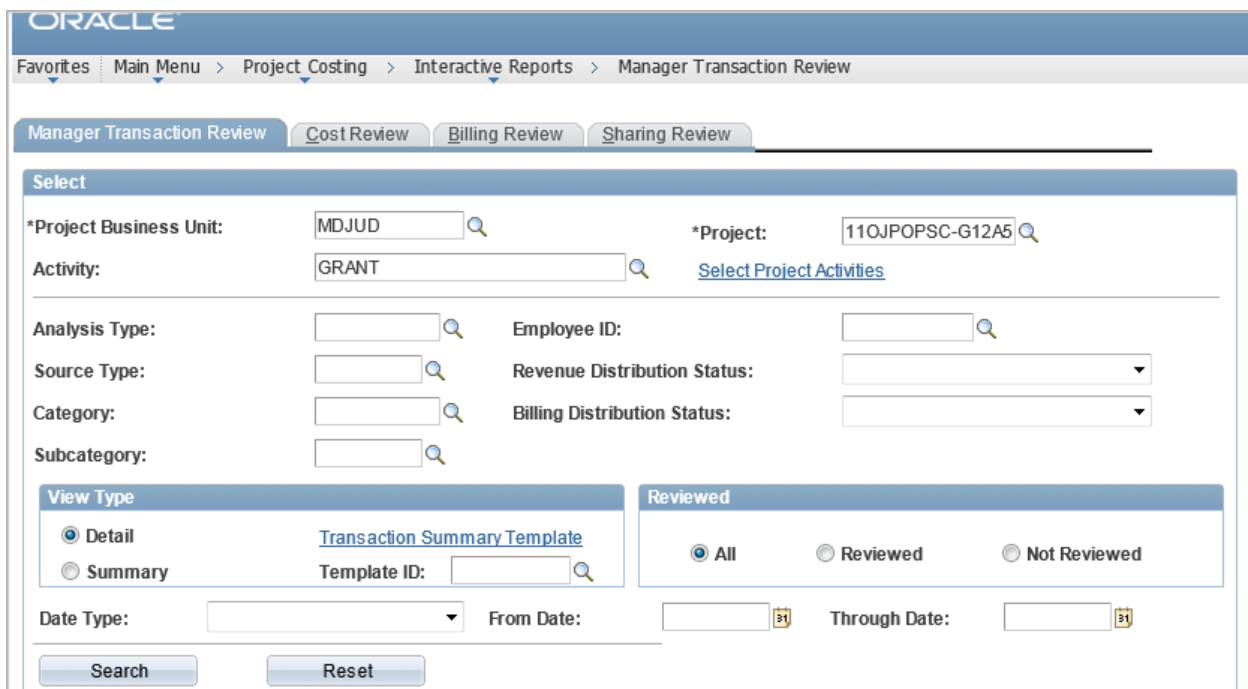
Project Costing Online Inquiries

Manager Transaction Review

Explanation: The project manager review functionality provides a flexible tool that enables a PM to search on a number of fields, make necessary adjustments, and mark reviewed transactions.

Navigation: Project Costing, Interactive Reports, Manager Transaction Review

Selection Criteria:



The screenshot displays the Oracle Manager Transaction Review interface. At the top, the Oracle logo is visible, followed by a breadcrumb trail: Favorites > Main Menu > Project Costing > Interactive Reports > Manager Transaction Review. Below this, there are tabs for Manager Transaction Review, Cost Review, Billing Review, and Sharing Review. The Manager Transaction Review tab is active.

The interface is divided into two main sections: Select and Reviewed.

Select Section:

- *Project Business Unit:** MDJUD (with a search icon)
- *Project:** 11OJPOPSC-G12A5 (with a search icon)
- Activity:** GRANT (with a search icon) and a link to [Select Project Activities](#)
- Analysis Type:** (with a search icon)
- Employee ID:** (with a search icon)
- Source Type:** (with a search icon)
- Revenue Distribution Status:** (dropdown menu)
- Category:** (with a search icon)
- Billing Distribution Status:** (dropdown menu)
- Subcategory:** (with a search icon)

View Type Section:

- View Type:** Detail (selected) and Summary (radio buttons)
- Transaction Summary Template:** (link)
- Template ID:** (with a search icon)

Reviewed Section:

- Reviewed:** All (selected), Reviewed, and Not Reviewed (radio buttons)

Date and Search Section:

- Date Type:** (dropdown menu)
- From Date:** (calendar icon)
- Through Date:** (calendar icon)
- Search:** (button)
- Reset:** (button)

Sample Inquiry Output:

Manager Transaction Review
Cost Review
Billing Review
Sharing Review

Project: 11QJPOPSC-G12A5
Description: 11QJP- Drug Courts
Currency: USD

Detail Review
Personalize | Find | View All | 1-10 of 52 | First | Last

General
Transaction Detail
Contract Information

Reviewed	Activity	Analysis Type	Amount	Adjust	Source Type	Category	Subcategory	Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$1,924.27	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$1,605.69	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$495.66	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$8,007.93	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$24,998.39	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$5,187.35	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$19,072.47	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$-12,033.55	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$41,581.50	<input type="checkbox"/>				Target
<input checked="" type="checkbox"/>	GRANT	ACT	\$14,298.98	<input type="checkbox"/>				Target

☒ [Select All Reviewed](#)
☐ [Clear All Reviewed](#)

Total Cost Amount: \$535,745.68 USD

Adjust

Save

Training Guide

PC/CA/GM Reports



Manager Transaction Review
Cost Review
Billing Review
Sharing Review

Project: 11OJPOPSC-G12A5
Description: 11OJP- Drug Courts
Currency: USD

Detail Review

Personalize
Find
View All
First
1-10 of 52
Last

General
Transaction Detail
Contract Information

Reviewed	Activity	Analysis Type	Amount	Source Type	Category	Subcategory	Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$1,924.27				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$1,605.69				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$495.66				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$8,007.93				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$24,998.39				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$5,187.35				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$19,072.47				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$-12,033.55				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$41,581.50				Source
<input checked="" type="checkbox"/>	GRANT	BIL	\$14,298.98				Source

Streamlined Billing

Process Monitor

Total Billing Amount:
\$535,745.68 USD

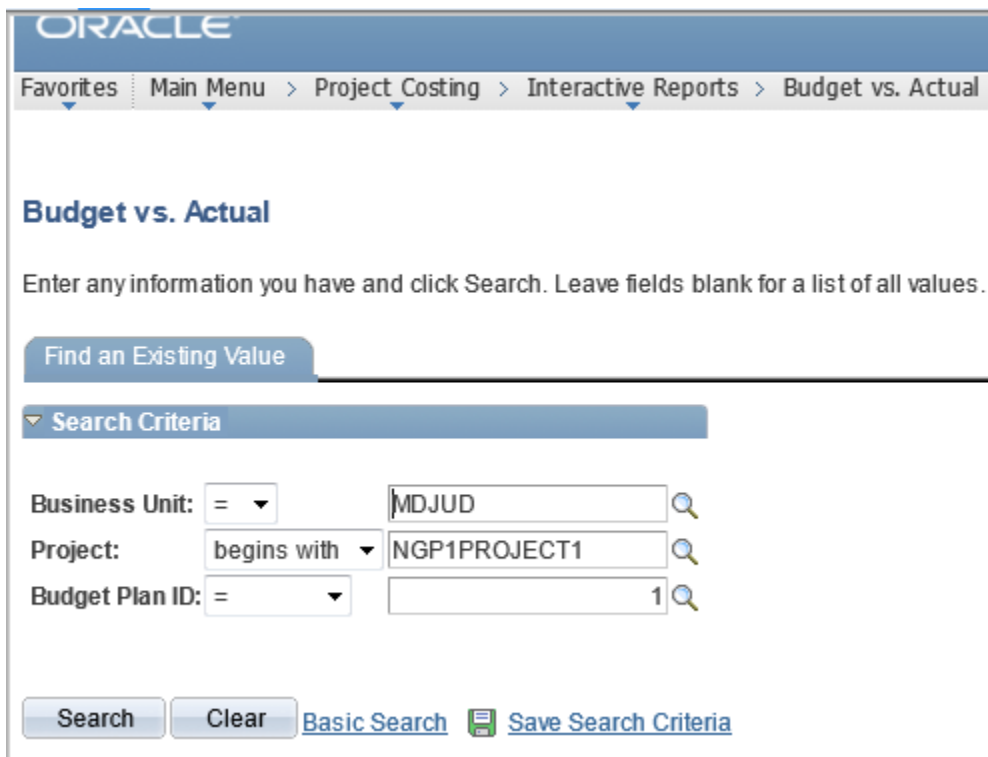
Budget vs. Actual

Explanation: Compare costs to budgeted amounts for cost budgets. Compare actual revenue to projected revenue for revenue budgets.

Note: The Project Costing, Utilities, Refresh Budget Summary Tables process needs to be processed to populate the table used by this inquiry.

Navigation: Project Costing, Interactive Reports, Budget vs. Actual

Selection Criteria:



The screenshot shows the Oracle Budget vs. Actual report interface. At the top, the Oracle logo is displayed. Below it, a breadcrumb trail reads: Favorites > Main Menu > Project Costing > Interactive Reports > Budget vs. Actual. The main heading is "Budget vs. Actual". Below this, a instruction states: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a search bar with the placeholder text "Find an Existing Value". Below the search bar is a section titled "Search Criteria" with a dropdown arrow. Under "Search Criteria", there are three rows of input fields: "Business Unit:" with a dropdown set to "=" and a text box containing "MDJUD"; "Project:" with a dropdown set to "begins with" and a text box containing "NGP1PROJECT1"; and "Budget Plan ID:" with a dropdown set to "=" and a text box containing "1". Each text box has a magnifying glass icon to its right. At the bottom, there are buttons for "Search" and "Clear", followed by links for "Basic Search" and "Save Search Criteria".

Sample Inquiry Output:

ORACLE Home

Favorites | Main Menu > Project Costing > Interactive Reports > Budget vs. Actual

Budget vs. Actual

Project: NGP1PROJECT1 Project Description: NGP1PROJECT1 DESCR
 Charging Level: Detail
 Budget Plan ID: 1 Plan Description: Total Project Budget
 Budget Type: Cost Budget Start Date: 02/25/2013
 Calendar: Fiscal Year Budget - 7/1

Amounts			
Budget Amount:	20,000.00	Actual Amount:	0.00
Remaining Amount:	20,000.00	Status:	Low

Currency: USD

Select Activity

[NGP1PROJECT1 DESCR](#)

[CAPITAL](#)


Activity Details

Activity: 0000000000000001

Description: CAPITAL

Budget Amount: 20,000.00 Actual Amount: 0.00

Remaining Amount: 20,000.00 Status: Low

Items			
Budget Item	Budget Amount	Actual Amount	Detail
0872	20,000.00	0.00	

Personalize | Find | View All | First 1 of 1 Last

Flexible Analysis

Explanation: The costs that appear in the Flexible Analysis Cost Summary grid are based on the analysis groups that are specified in the flexible analysis template.

Note: A Flexible Analysis template needs to exist and a Flexible Analysis User Default needs to be selected.

Navigation: Project Costing, Interactive Reports, Flexible Analysis

Selection Criteria:

ORACLE

Favorites Main Menu > Project Costing > Flexible Analysis Template

Flexible Analysis User Default

User ID: james.roberts Name: FRANK BROCCOLINA

Business Unit: MDJUD

Template: PUB-BUDACTCOM ☒ Public

*Description: Budget vs Actuals & Commit

Flexible Analysis Template				Personalize	Find	View All	First	1-3 of 3	Last
Number	Analysis Group	Field Heading							
1	BUD	Budgets							
2	PSCST	Accounting Costs							
3	COMMT	Commitments							

ORACLE



Favorites Main Menu > Project Costing > Flexible Analysis User Default

Flexible Analysis User Default

User ID: james.roberts Name: Roberts, James

Flexible Analysis Template				Personalize	Find	View All	First	1 of 1	Last
	User ID	Name	Description						
PUB-BUDACTCOM	james.roberts	Roberts, James	Budget vs Actuals & Commit						

Sample Inquiry Output:

ORACLE			
Favorites Main Menu > Project Costing > Interactive Reports > Flexible Analysis			
Flexible Analysis			
Project:	11OJPOPSC-G12A5	Description:	11OJP- Drug Courts
Flexible Analysis Cost Summary : User Template : PUB-BUDACTCOM			
Personalize Find View All   First 1 of 1 Last			
Project	Budgets	Accounting Costs	Commitments
11OJPOPSC-G12A5	\$2,410,564.00	\$535,745.68	
Flexible Analysis Template			

Explanation: Review projects costs that are related to Commitment Control budget exceptions.

Navigation: Project Costing, Review Costs, Accumulated Costs, Budget Exceptions

[Favorites](#)
[Main Menu](#)
[Project Costing](#)
[Review Costs](#)
[Accumulated Costs](#)
[Budget Exceptions](#)

Budget Exceptions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit:	= ▼	MDJUD	
Ledger Group:	= ▼	PROJ_GRNT	
Account:	begins with ▼		
Department:	begins with ▼		
Batch Agency:	begins with ▼		
Program Cost Account:	begins with ▼		
Fund:	begins with ▼		
Appropriation Number:	begins with ▼		
Program Code:	begins with ▼		
Approp Year:	begins with ▼		
Affiliate:	begins with ▼		
Fund Affiliate:	begins with ▼		
PC Business Unit:	begins with ▼		
Project:	begins with ▼		
Activity:	begins with ▼		
Source Type:	begins with ▼		
Budget Period:	begins with ▼		
Statistics Code:	begins with ▼		
Budget Type:	begins with ▼		

Sample Inquiry Output:

[Basic Search](#)

Search Results

[View All](#)

Business Unit	Budget Type	Ledger Group	Account	Department	Batch Agency	Program Cost Account	Fund	Appropriation Number	Program Code	Approp Year	Affiliate	Fund Affiliate	PC Business Unit	Project
MDJUD	Proj/Grant Budget Definition	PROJ GRNT	0000	(blank)	C25	H0815	0005	(blank)	H081	AY2013	(blank)	(blank)	MDJUD	10DHRCSEAXH0815
MDJUD	Proj/Grant Budget Definition	PROJ GRNT	0000	(blank)	C25	L1115	0005	(blank)	L111	AY2013	(blank)	(blank)	MDJUD	10DHRCSEAXL1115
MDJUD	Proj/Grant Budget Definition	PROJ GRNT	0000	(blank)	C25	S1715	0005	(blank)	S171	AY2013	(blank)	(blank)	MDJUD	10DHRCSEAXS1715

Journals by Activity

Explanation: View journal entries that are associated with an activity and drill down to GEARS General Ledger. The system retrieves transactions from the Project Transaction table where the journal ID is not missing.

Navigation: Project Costing, Review Costs, Accumulated Costs, Journal Entries by Activity

Selection Criteria:



Journal Entries by Activity

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Business Unit:	=	MDJUD
Project:	begins with	11OJPOPSC-G12A5
Activity:	begins with	
WBS ID:	begins with	
Project Description:	begins with	
Activity Description:	begins with	
Activity Type:	begins with	
Status as of Effective Date:	=	
Activity Owner:	begins with	
New Milestone:	=	









☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Sample Inquiry Output:

Journal Entries by Activity

Project: 11OJPOPSC-G12A5 Description: 11OJP- Drug Courts
Activity: GRANT Description: Grant Activity


Journal Entries							
Personalize Find View All   First 1-6 of 25 Last							
Analysis Type	General Ledger Business Unit	Journal ID	Currency	Unit of Measure	Quantity	Amount	
ACT	MDJUD	CNV0003603	USD			1,924.27	
ACT	MDJUD	CNV0003606	USD			1,605.69	
ACT	MDJUD	CNV0003613	USD			495.66	
ACT	MDJUD	CNV0003653	USD			8,007.93	
ACT	MDJUD	CNV0003686	USD			78,806.16	
ACT	MDJUD	CNV0003690	USD			14,298.98	

Purchase Orders by Activity

Explanation: View purchase orders that are associated with an activity and drill down to GEARS Purchasing. The system retrieves transactions from the Project Transaction table where the purchase order ID is not missing.

Navigation: Project Costing, Review Costs, Accumulated Costs, Purchase Orders by Activity

Selection Criteria:








Favorites | Main Menu > Project Costing > Review Costs > Accumulated Costs > Purchase Orders by Activity

Purchase Orders by Activity


Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit:	= ▼	MDJUD	
Project:	begins with ▼	11OJPOPSC-G12A5	
Activity:	begins with ▼		
WBS ID:	begins with ▼		
Project Description:	begins with ▼		
Activity Description:	begins with ▼		
Activity Type:	begins with ▼		
Status as of Effective Date:	= ▼		▼
Activity Owner:	begins with ▼		
New Milestone:	= ▼		▼

☐ Case Sensitive

Search Clear Basic Search  Save Search Criteria

Sample Inquiry Output:

Purchase Orders by Activity

Project: 11OJPOPSC-G12A5 Description: 11OJP- Drug Courts
Activity: GRANT Description: Grant Activity

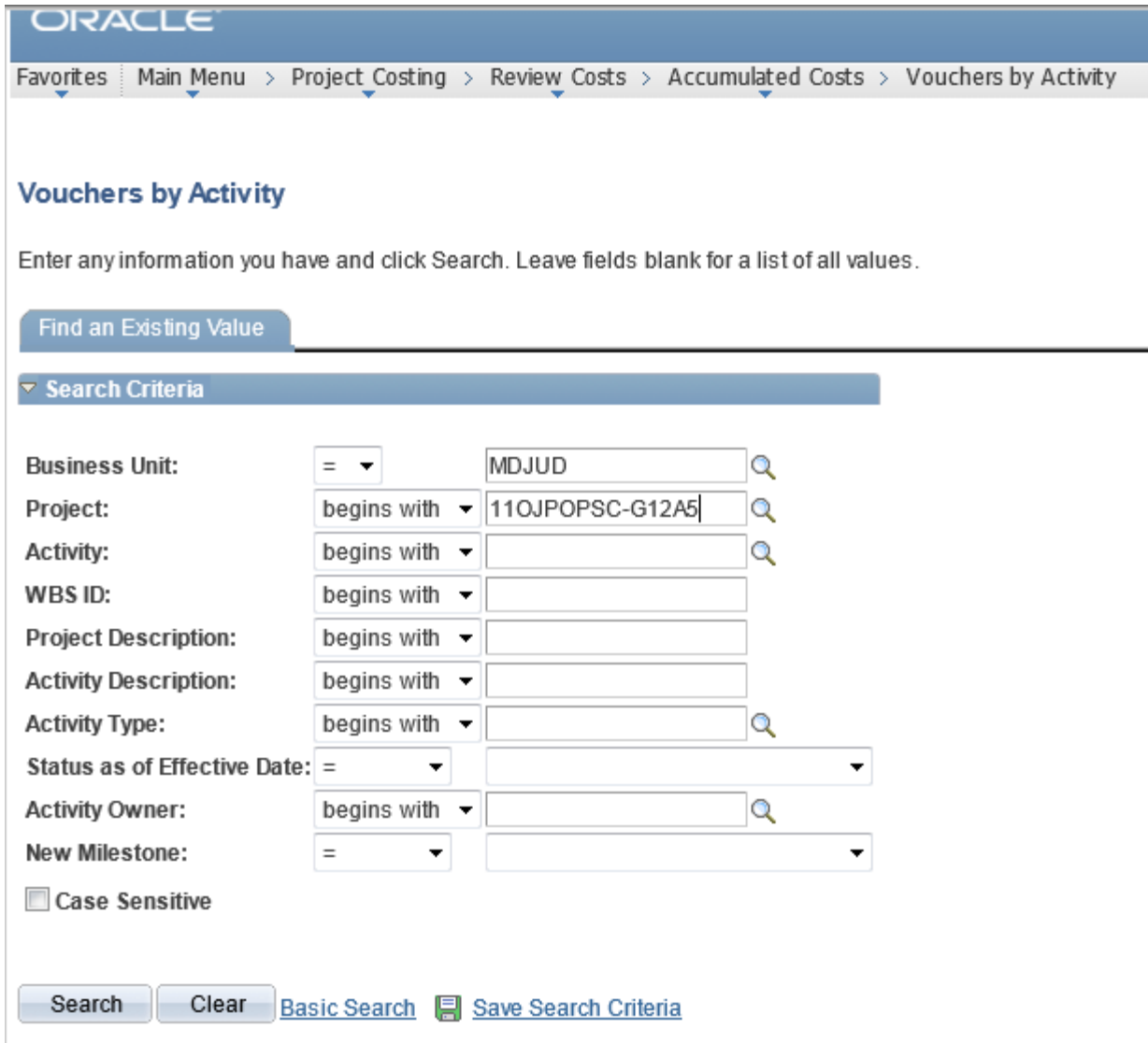
Purchase Orders						
Personalize Find View All   First 1 of 1 Last						
Analysis Type	Purchase Order	Currency	Unit of Measure	Quantity	Amount	
						

Vouchers by Activity

Explanation: View vouchers that are associated with an activity and drill down to GEARS Payables. The system retrieves transactions from the Project Transaction table where the voucher ID is not missing.

Navigation: Project Costing, Review Costs, Accumulated Costs, Vouchers by Activity

Selection Criteria:



The screenshot shows the Oracle Vouchers by Activity search interface. At the top, the Oracle logo is displayed. Below it, a breadcrumb trail reads: Favorites > Main Menu > Project Costing > Review Costs > Accumulated Costs > Vouchers by Activity. The main heading is "Vouchers by Activity". Below the heading, a message states: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a "Find an Existing Value" button. Below this is a "Search Criteria" section with a dropdown arrow. The search criteria include: Business Unit (dropdown menu, value: MDJUD), Project (dropdown menu, value: begins with, text: 11OJPOPSC-G12A5), Activity (dropdown menu, value: begins with), WBS ID (dropdown menu, value: begins with), Project Description (dropdown menu, value: begins with), Activity Description (dropdown menu, value: begins with), Activity Type (dropdown menu, value: begins with), Status as of Effective Date (dropdown menu, value: =), Activity Owner (dropdown menu, value: begins with), and New Milestone (dropdown menu, value: =). There is a "Case Sensitive" checkbox. At the bottom, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

ORACLE

Favorites > Main Menu > Project Costing > Review Costs > Accumulated Costs > Vouchers by Activity

Vouchers by Activity

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit: = MDJUD

Project: begins with 11OJPOPSC-G12A5

Activity: begins with

WBS ID: begins with

Project Description: begins with

Activity Description: begins with

Activity Type: begins with

Status as of Effective Date: =

Activity Owner: begins with

New Milestone: =






☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Sample Inquiry Output:

Vouchers by Activity

Project: 11OJPOPSC-G12A5 Description: 11OJP- Drug Courts
Activity: GRANT Description: Grant Activity

Vouchers							Personalize Find View All   First  1 of 1  Last
Analysis Type	Voucher	Vendor	Currency	Unit of Measure	Quantity	Amount	

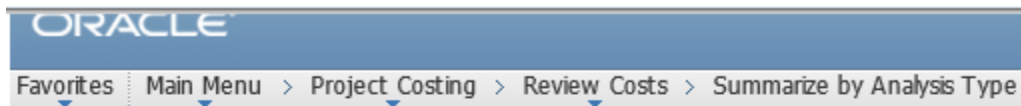
Summarization by Analysis Type

Explanation: View a basic summary of costs that includes period-to-date, year-to-date, and life-to-date totals for each analysis type. Totals that appear on this page are for the selected project and all the activities that are directly attached to that project.

Note: The Set as of Period needs to be populated first.

Navigation: Project Costing, Review Costs, Summarize by Analysis Type

Selection Criteria:



Summarize by Analysis Type

Enter any information you have and click Search. Leave fields blank for a list of all values.


Search Criteria

Business Unit: =

Project: begins with

Description: begins with

☐ Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)


Sample Inquiry Output:

ORACLE

Favorites | Main Menu > Project Costing > Review Costs > Summarize by Analysis Type

Summarize by Analysis Type | Set As of Period

Project: CSEA12-034 Description: CRA IVD

Calendar ID: 

Fiscal Year:

Accounting Period:

Summarize by Analysis Type | Set As of Period

Project: CSEA12-034 Description: CRA IVD

Project Financial Summary					
Analysis Type	General Ledger Business Unit	Currency	Period to Date Amount	Year to Date Amount	Life to Date Amount
ACT	MDJUD	USD	0.00	10,000.00	10,000.00
BIL	MDJUD	USD	0.00	6,600.00	6,600.00
BUD	MDJUD	USD	1,320,000.00	1,320,000.00	1,320,000.00
CBU	MDJUD	USD	680,000.00	680,000.00	680,000.00
COM	MDJUD	USD	10,000.00	10,000.00	10,000.00
CRV	MDJUD	USD	0.00	10,000.00	10,000.00
LCL	MDJUD	USD	0.00	3,400.00	3,400.00

Customer Contracts Reports

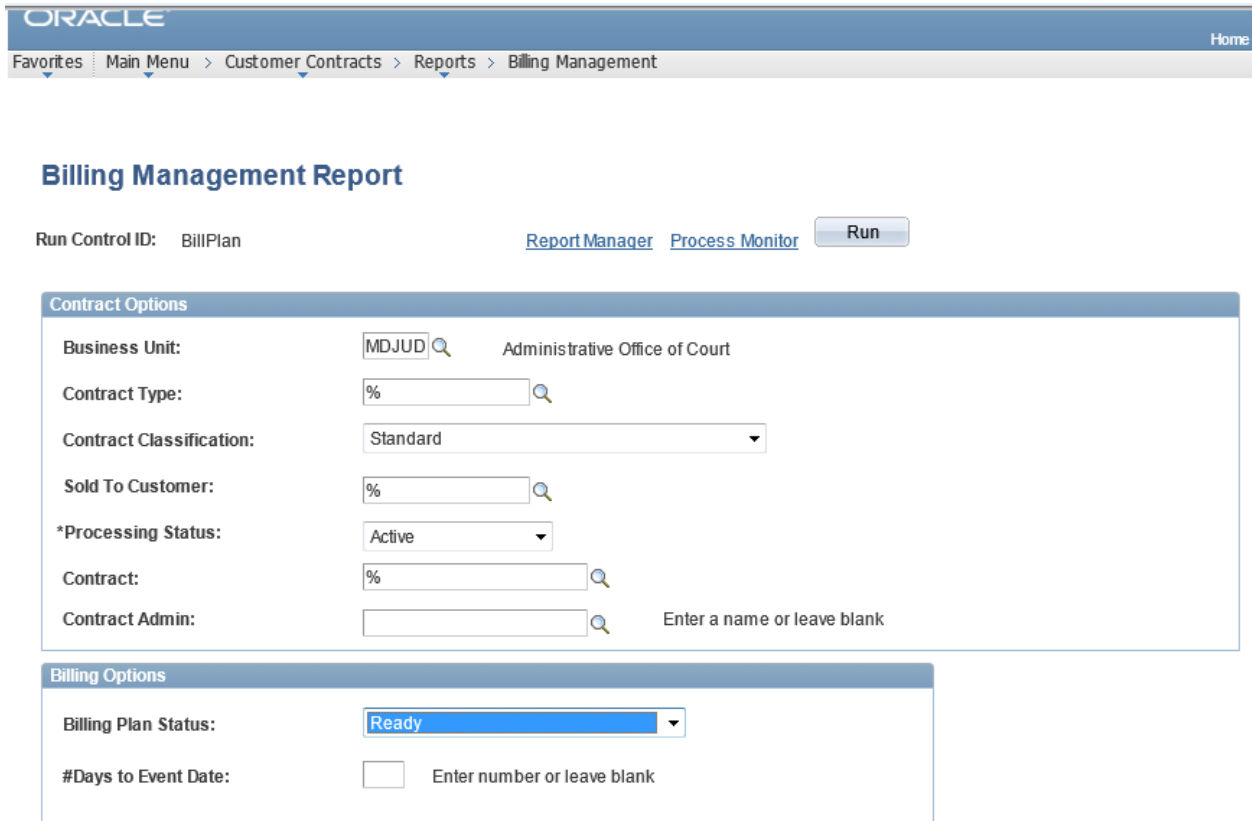
Report ID and Report Name	Description	Navigation	Run Control Page
CA_BILL or CA_BILL_XP Contracts Billing Management Report	<p>Displays details of billing plans, including the events associated with those plans, the status of the events, and the amount of future billings.</p> <p>Note. This report displays billing plans with open events only.</p>	Customer Contracts, Reports, Billing Management	RUN_CA_BIL_RPT
CA_LMT or CA_LMT_XP Active Contracts Limit Amount Management Report	Displays details of a contract's limits and the amount of the limit remaining.	Customer Contracts, Reports, Limit Amount	RUN_CA_LMT_RPT

CA_BILL Contracts Billing Management Report

Explanation: Displays details of billing plans, including the events associated with those plans, the status of the events, and the amount of future billings.

Navigation: Customer Contracts, Reports, Billing Management

Run Control:



The screenshot shows the Oracle Billing Management Report Run Control interface. At the top, the Oracle logo is on the left and a 'Home' link is on the right. Below the logo is a breadcrumb trail: 'Favorites > Main Menu > Customer Contracts > Reports > Billing Management'. The main title 'Billing Management Report' is centered. Below the title, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'Run Control ID' is set to 'BillPlan'. The interface is divided into two sections: 'Contract Options' and 'Billing Options'. The 'Contract Options' section includes fields for 'Business Unit' (MDJUD, Administrative Office of Court), 'Contract Type' (%), 'Contract Classification' (Standard), 'Sold To Customer' (%), '*Processing Status' (Active), 'Contract' (%), and 'Contract Admin' (Enter a name or leave blank). The 'Billing Options' section includes a 'Billing Plan Status' dropdown (Ready) and a '#Days to Event Date' field (Enter number or leave blank).

ORACLE Home

Favorites > Main Menu > Customer Contracts > Reports > Billing Management

Billing Management Report

Run Control ID: BillPlan [Report Manager](#) [Process Monitor](#) [Run](#)

Contract Options

Business Unit: MDJUD Administrative Office of Court

Contract Type: %

Contract Classification: Standard

Sold To Customer: %

*Processing Status: Active

Contract: %

Contract Admin: Enter a name or leave blank

Billing Options

Billing Plan Status: Ready

#Days to Event Date: Enter number or leave blank

Sample Report Output:

11/4/20

Contracts Billing Management Report

Business Unit: US001 US001 NEW YORK OPERATIONS

Contract Currency: USD

<u>Sold To Customer</u>	<u>Contract</u>	<u>Contract Type</u>	<u>Bill Plan Id</u>	<u>Billing Method</u>	<u>Event Num</u>	<u>Event Type</u>	<u>Event Status</u>	<u>Milestone Event Origin</u>	<u>MS Nbr</u>	<u>Event Date</u>	<u>Amount</u>
1001 Apex	FIXED INTEGRATION	COMMERCIAL	B102	Milestone	2	Date	Pending	Contract	0	2/12/2001	9,375.00
1001 Apex	FIXED INTEGRATION	COMMERCIAL	B102	Milestone	3	Date	Pending	Contract	0	2/12/2001	31,250.00
1001 Apex	FIXED INTEGRATION	COMMERCIAL	B102	Milestone	4	Date	Pending	Contract	0	2/12/2001	6,250.00
Totals for BU US001 in USD											46,875.00

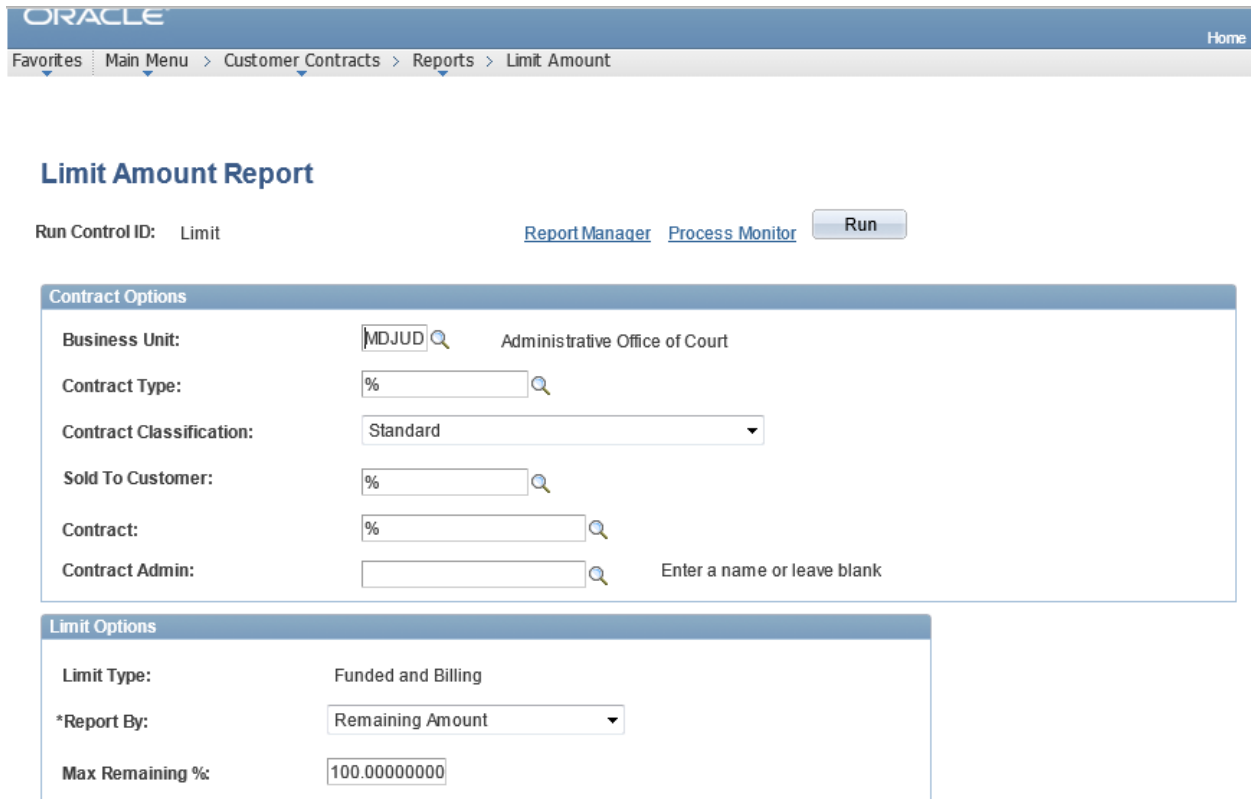
1

CA_LMT Active Contracts Limit Amount Management Report

Explanation: Displays details of a contract's limits and the amount of the limit remaining.

Navigation: Customer Contracts, Reports, Limit Amount

Run Control:



The screenshot shows the Oracle Gears web interface for the CA_LMT Active Contracts Limit Amount Management Report. The breadcrumb trail at the top reads: Favorites > Main Menu > Customer Contracts > Reports > Limit Amount. The page title is "Limit Amount Report". Below the title, there is a "Run Control ID:" field with the value "Limit". To the right of this field are two links: "Report Manager" and "Process Monitor", followed by a "Run" button. The main form is divided into two sections: "Contract Options" and "Limit Options".

Contract Options

Business Unit:	<input type="text" value="MDJUD"/>	Administrative Office of Court
Contract Type:	<input type="text" value="%"/>	
Contract Classification:	<input type="text" value="Standard"/>	
Sold To Customer:	<input type="text" value="%"/>	
Contract:	<input type="text" value="%"/>	
Contract Admin:	<input type="text" value=""/>	Enter a name or leave blank

Limit Options

Limit Type:	Funded and Billing
*Report By:	<input type="text" value="Remaining Amount"/>
Max Remaining %:	<input type="text" value="100.00000000"/>

Sample Report Output:

<u>Active Contracts Limit Amount Managment Report</u>							
6/23/2							
Business Unit:	US001	Contract Admin:					
Limit Type:	Fund/Bill	Contract Type:	%				
Sold to Customer:	%	Contract Classification:	Standard				
Report By:	Remaining	Contract:	CON00000000030				
Max Remaining Percent:	100.00 %						
Business Unit:	US001	US001 NEW YORK OPERATIONS					
<u>Contract Number</u>	<u>Line</u>	<u>Transaction Id</u>	<u>Funding Limits</u>	<u>Limit</u>	<u>Remaining</u>	<u>Remaining %</u>	<u>Last Transaction Date</u>
CON00000000030	1			10,000.00	10,000.00 USD	100.00	<u>Last Processing Date</u>

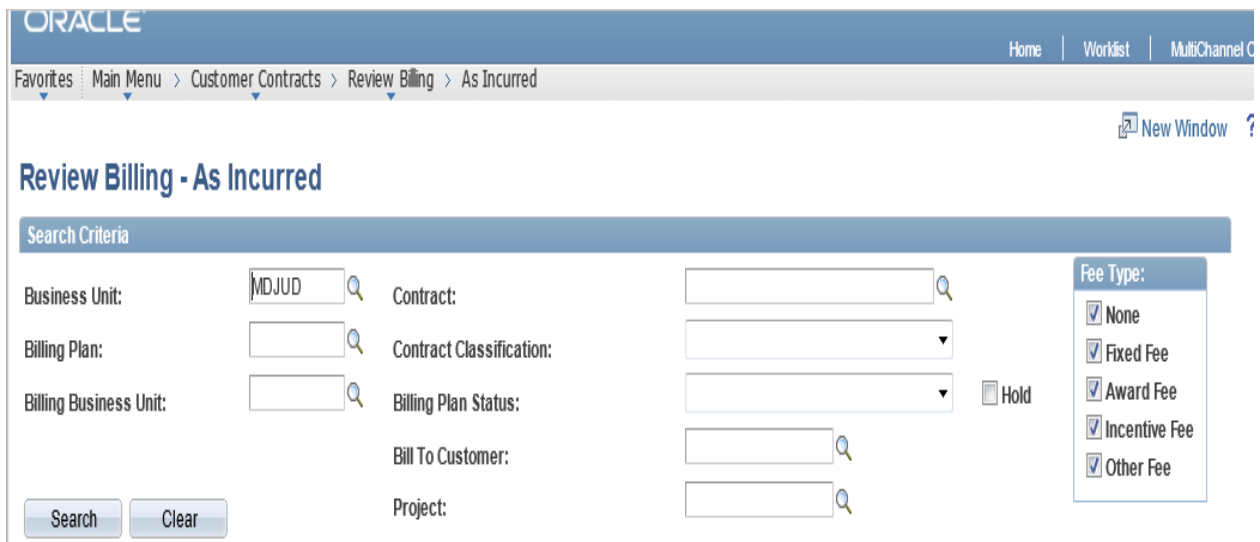
Customer Contract Online Inquiries

Review Billing

Explanation: View billing plan activity or update plan status for both pending and billed amounts, for any cross-section of the GEARS Contracts system.

Navigation: Customer Contracts, Review Billing, As Incurred

Run Control:



The screenshot displays the Oracle GEARS web application interface for the 'Review Billing - As Incurred' function. The top navigation bar includes links for 'Home', 'Worklist', and 'MultiChannel C'. Below this, a breadcrumb trail shows the path: 'Favorites | Main Menu > Customer Contracts > Review Billing > As Incurred'. A 'New Window' button is visible on the right. The main heading is 'Review Billing - As Incurred'. Underneath, a 'Search Criteria' section contains several input fields and a 'Fee Type' dropdown menu. The 'Business Unit' field is populated with 'MDJUD'. The 'Contract' field is empty. The 'Billing Plan' field is empty. The 'Contract Classification' field is empty. The 'Billing Business Unit' field is empty. The 'Billing Plan Status' field is empty. The 'Bill To Customer' field is empty. The 'Project' field is empty. The 'Fee Type' dropdown menu is open, showing options: 'None', 'Fixed Fee', 'Award Fee', 'Incentive Fee', and 'Other Fee', all of which are checked. A 'Hold' checkbox is also present. At the bottom left, there are 'Search' and 'Clear' buttons.

Search Criteria	
Business Unit:	MDJUD
Billing Plan:	
Billing Business Unit:	
Contract:	
Contract Classification:	
Billing Plan Status:	
Bill To Customer:	
Project:	

Fee Type:

- ☒ None
- ☒ Fixed Fee
- ☒ Award Fee
- ☒ Incentive Fee
- ☒ Other Fee

Hold

Search Clear

Sample Report Output:

Billing										
Contract Billing Information		Billing Financial Information								
Business Unit	Contract	Bill Plan ID	Plan Description	Status	Hold	Hold Date	Billing Business Unit	Customer	Project	History
MDJUD	08DHRCSEX	B101	As-Incurred Bill/Revenue Plan	Ready	<input type="checkbox"/>		GRANT	GM-0000009	08DHRCSEXG20F5	History
MDJUD	09DHRCSEX	B101	As-Incurred Bill/Revenue Plan	Ready	<input type="checkbox"/>		GRANT	GM-0000009	09DHRCSEXG26F5	History
MDJUD	118JIADR1	B101	As-Incurred Bill/Revenue Plan	Ready	<input type="checkbox"/>		GRANT	GM-0000001	118JIADR1G09A5	History
MDJUD	11DHRCSEX	B101	As-Incurred Bill/Revenue Plan	Ready	<input type="checkbox"/>		GRANT	GM-0000009	11DHRCSEXG17F5	History

Grants Reports and Forms

Other Federal Forms

Report ID and Report Name	Description	Navigation	Run Control Page
PHS 398 Federal Form – PHS 398	Provides information for the Federal Grant Application.	Grants, Proposals, Print Proposal	GM_PROP_PRINT_REQ

Administrative Reports

Report ID and Report Name	Description	Navigation	Run Control Page
GMPER035 Current and Pending Support	Provides an overall summary of the total commitments for a particular investigator.	Grants, Professionals, Other Support Report	RUN_GM_PERS_BIO

PeopleSoft Billing Forms

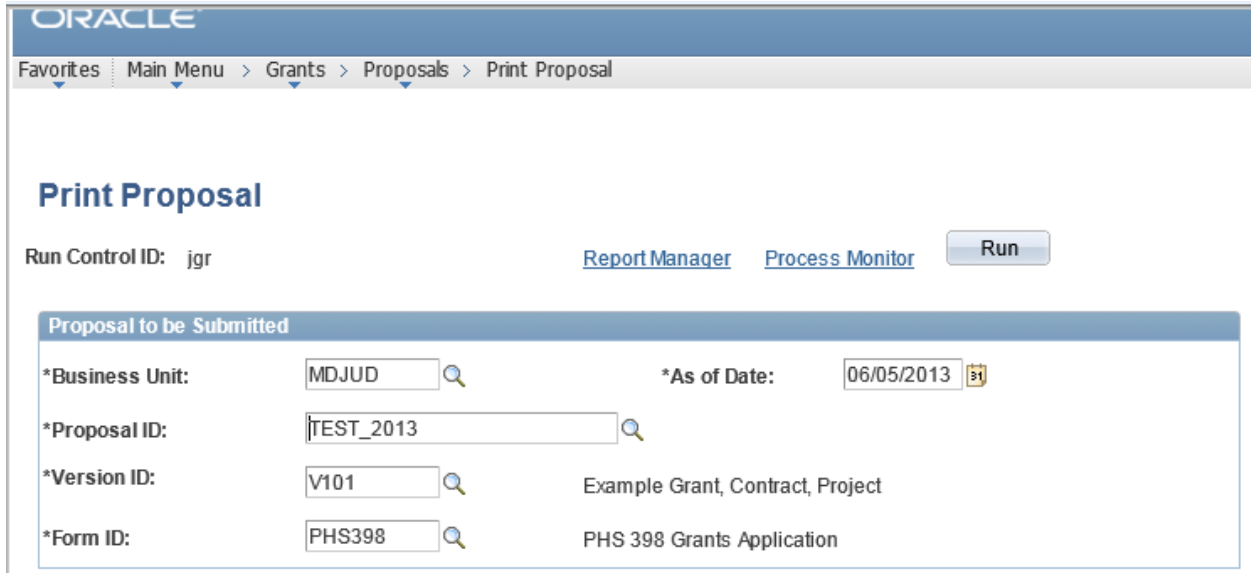
Report ID and Report Name	Description	Navigation	Run Control Page
GM_GEN Generic Letterhead Invoice	Provides a generic invoice. It includes invoice header and expense line detail information that the expense account tree definition controls.	Billing, Generate Invoices, Non-Consolidated, Single Action Invoice Billing, Generate Invoices, Non-Consolidated, Print Pro Forma Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices	RUN_BI_PRNTIVC

PHS 398 Federal Form – PHS 398

Explanation: Provides information for the Federal Grant Application.

Navigation: Grants, Proposals, Print Proposal

Run Control:



The screenshot shows the Oracle PHS 398 Print Proposal form. The top navigation bar includes 'Favorites', 'Main Menu', 'Grants', 'Proposals', and 'Print Proposal'. The main title is 'Print Proposal'. Below the title, there is a 'Run Control ID' field with the value 'jgr'. To the right are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The form is titled 'Proposal to be Submitted' and contains several input fields with search icons:

Proposal to be Submitted	
*Business Unit:	MDJUD
*As of Date:	06/05/2013
*Proposal ID:	TEST_2013
*Version ID:	V101
*Form ID:	PHS398

Below the input fields, there are two lines of text: 'Example Grant, Contract, Project' and 'PHS 398 Grants Application'.

Sample Report Output:

Partial sample

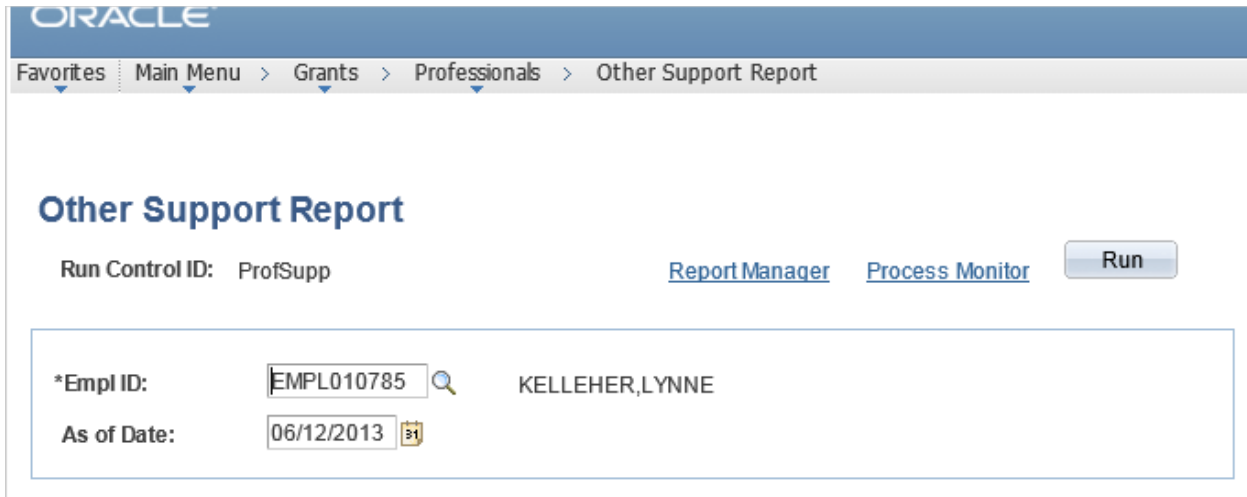
Form Approved Through 09/30/2007		OMB No. 0925-0001	
Department of Health and Human Services Public Health Services Grant Application <i>Do not exceed character length restrictions indicated.</i>		LEAVE BLANK—FOR PHS USE ONLY. Type _____ Activity _____ Number _____ Review Group _____ Formerly _____ Council/Board (Month, Year) _____ Date Received _____	
1. TITLE OF PROJECT (Do not exceed 81 characters, including spaces and punctuation.) The effects of insulin on laboratory rats			
2. RESPONSE TO SPECIFIC REQUEST FOR APPLICATIONS OR PROGRAM ANNOUNCEMENT OR SOLICITATION <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES (If "Yes," state number and title) Number: _____ Title: _____			
3. PRINCIPAL INVESTIGATOR/PROGRAM DIRECTOR		New Investigator <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	
3a. NAME (Last, first, middle) Schumacher, Kenneth		3b. DEGREE(S) MD	
3c. POSITION TITLE Principal Investigator		3d. MAILING ADDRESS (Street, city, state, zip code) USA	
3e. DEPARTMENT, SERVICE, LABORATORY, OR EQUIVALENT Engineering		E-MAIL ADDRESS: kenneths@university.edu	
3f. MAJOR SUBDIVISION Biology Department			
3g. TELEPHONE AND FAX (Area code, number and extension) TEL: 510/555-1111 FAX: _____			
4. HUMAN SUBJECTS RESEARCH No <input checked="" type="checkbox"/> Yes <input type="checkbox"/>		5. VERTEBRATE ANIMALS <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	
4a. Research Exempt No <input type="checkbox"/> Yes <input type="checkbox"/>		5a. If "Yes," IACUC approval Date _____	
4b. Human Subjects Assurance No. _____		5b. Animal welfare assurance no. _____	
4c. Clinical Trial <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/>		4d. NIH-defined Phase II Clinical Trial <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/>	
4e. If "Yes," Exemption No. _____			
6. DATES OF PROPOSED PERIOD OF SUPPORT (month, day, year—MM/DD/YY) From 01/01/05 Through 12/31/09		7. COSTS REQUESTED FOR INITIAL BUDGET PERIOD 7a. Direct Costs (\$) \$75,000	
		7b. Total Costs (\$) \$100,500	
		8a. Direct Costs (\$) \$510,150	
		8b. Total Costs (\$) \$652,650	
9. APPLICANT ORGANIZATION Name PeopleSoft University Address 4305 Hacienda Dr Pleasanton, CA 94588 USA		10. TYPE OF ORGANIZATION Public: <input type="checkbox"/> Federal <input type="checkbox"/> State <input type="checkbox"/> Local Private: <input type="checkbox"/> Private Nonprofit For-profit: <input checked="" type="checkbox"/> General <input type="checkbox"/> Small Business <input type="checkbox"/> Woman-owned <input type="checkbox"/> Socially and Economically Disadvantaged	
		11. ENTITY IDENTIFICATION NUMBER 123 DUNS NO 18915 Cong. District _____	
12. ADMINISTRATIVE OFFICIAL TO BE NOTIFIED IF AWARD IS MADE Name _____ Title _____ Address _____ Tel: _____ FAX: _____ E-Mail: _____		13. OFFICIAL SIGNING FOR APPLICANT ORGANIZATION Name _____ Title _____ Address _____ Tel: _____ FAX: _____ E-Mail: _____	
14. PRINCIPAL INVESTIGATOR/PROGRAM DIRECTOR ASSURANCE: I certify that the statements herein are true, complete and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. I agree to accept responsibility for the scientific conduct of this project and to provide the required progress reports if a grant is awarded as a result of this application.		SIGNATURE OF PI/PPD NAMED IN 3a. (In ink. "Per" signature not acceptable.)	
15. APPLICANT ORGANIZATION CERTIFICATION AND ACCEPTANCE: I certify that the statements herein are true, complete and accurate to the best of my knowledge, and accept the obligation to comply with Public Health Services terms and conditions if a grant is awarded as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.		SIGNATURE OF OFFICIAL NAMED IN 13. (In ink. "Per" signature not acceptable.)	
		DATE _____	
		DATE _____	
PHS 396 (Rev. 09/04)		Form Page 1	

GMPER035 Current and Pending Support

Explanation: Provides an overall summary of the total commitments for a particular investigator.

Navigation: Grants, Professionals, Other Support Report

Run Control:





ORACLE

Favorites Main Menu > Grants > Professionals > Other Support Report

Other Support Report

Run Control ID: ProfSupp [Report Manager](#) [Process Monitor](#) Run

*Empl ID:  KELLEHER,LYNNE

As of Date: 

Sample Report Output:

Report ID: CMFER035

PeopleSoft
CURRENT AND PENDING SUPPORT

Page No. 2
Run Date 09/07/1999
Run Time 11:42:39

Ben Tiger
Professor
100 Main St. #120
San Mateo CA 90101
USA

Pending

Unit	Proposal	Version	Project	Begin Date	End Date	Effort %	Amount	Role	Sponsor/Title
EDGVT	DALE_FRI2	V1	DALE_FRI2	07/01/1999	06/30/2000	100.00	246,000.00	PI	California University Dale's Friday Proposal
EDGVT	DALE_FRI2	V1	DALE_FRI2B	07/01/1999	06/30/2000	75.00	246,000.00	PI	California University Dale's Friday Proposal
EDGVT	DALE_FRI2	V1	DALE_FRI2C	07/01/1999	06/30/2000	100.00	246,000.00	PI	California University Dale's Friday Proposal
EDGVT	DALE_FRI3	V1	DALE_FRI3	07/01/1999	06/30/2000	100.00	198,000.00	PI	California University Third Proposal
EDGVT	DALE_FRI4	V1	DALE_FRI4	07/01/1999	06/30/2000	100.00	198,000.00	PI	California University Dale's Friday Proposal
EDGVT	DALE_FRI4	V1	DALE_FRI4B	07/01/1999	06/30/2000	75.00	198,000.00	PI	California University Dale's Friday Proposal
EDGVT	DALE_FRI4	V1	DALE_FRI4C	07/01/1999	06/30/2000	100.00	198,000.00	PI	California University Dale's Friday Proposal

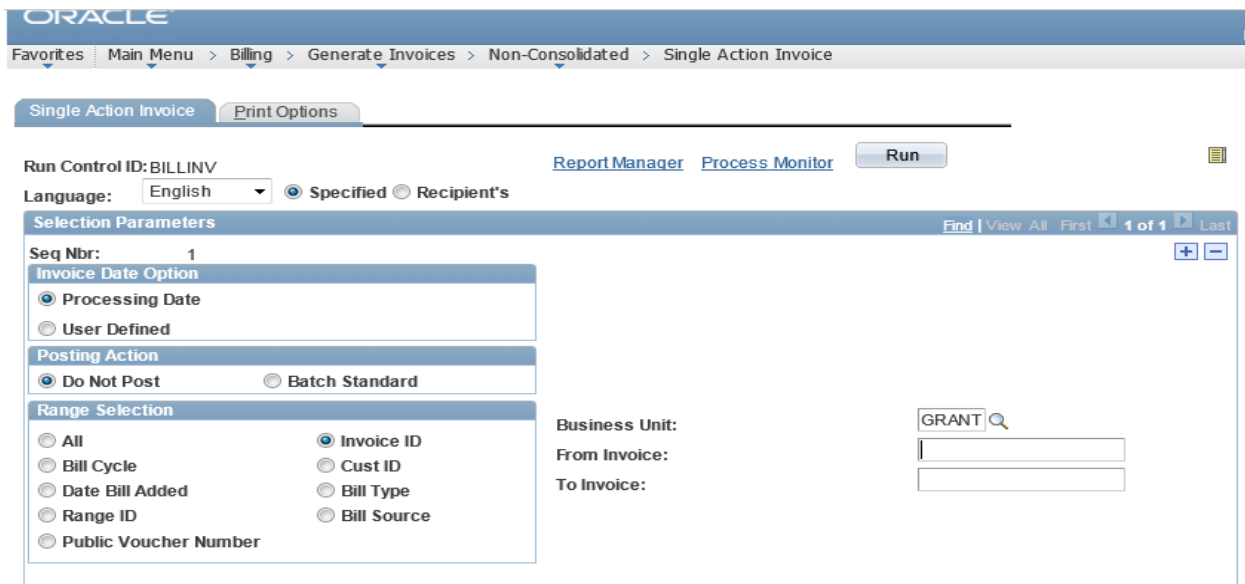
End of Report

GM_GEN Generic Letterhead Invoice

Explanation: Provides a generic invoice. It includes invoice header and expense line detail information that the expense account tree definition controls.

Navigation: Billing, Generate Invoices, Non-Consolidated, Single Action Invoice
Billing, Generate Invoices, Non-Consolidated, Print Pro Forma
Billing, Generate Invoices, Non-Consolidated, Finalize and Print Invoices

Run Controls:



ORACLE

Favorites | Main Menu > Billing > Generate Invoices > Non-Consolidated > Single Action Invoice

Single Action Invoice | Print Options

Run Control ID: BILLINV [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English ☒ Specified ☐ Recipient's

Selection Parameters Find | View All First 1 of 1 Last

Seq Nbr: 1

Invoice Date Option

☒ Processing Date
☐ User Defined

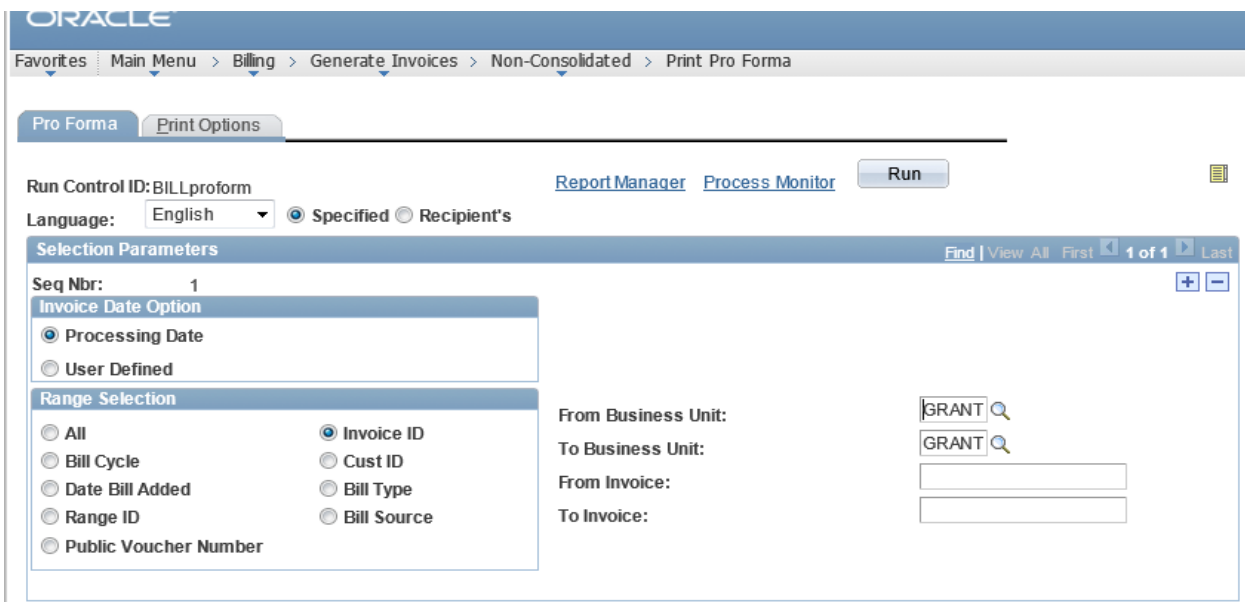
Posting Action

☒ Do Not Post ☐ Batch Standard

Range Selection

☐ All ☒ Invoice ID
☐ Bill Cycle ☐ Cust ID
☐ Date Bill Added ☐ Bill Type
☐ Range ID ☐ Bill Source
☐ Public Voucher Number

Business Unit: GRANT
From Invoice:
To Invoice:



ORACLE

Favorites | Main Menu > Billing > Generate Invoices > Non-Consolidated > Print Pro Forma

Pro Forma | Print Options

Run Control ID: BILLproform [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English ☒ Specified ☐ Recipient's

Selection Parameters Find | View All First 1 of 1 Last

Seq Nbr: 1

Invoice Date Option

☒ Processing Date
☐ User Defined

Range Selection

☐ All ☒ Invoice ID
☐ Bill Cycle ☐ Cust ID
☐ Date Bill Added ☐ Bill Type
☐ Range ID ☐ Bill Source
☐ Public Voucher Number

From Business Unit: GRANT
To Business Unit: GRANT
From Invoice:
To Invoice:

ORACLE

Favorites Main Menu > Billing > Generate Invoices > Non-Consolidated > Finalize and Print Invoices

Finalize and Print Print Options

Run Control ID: BILLfinal [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English ☒ Specified ☐ Recipient's

Selection Parameters Find | View All First 1 of 1 Last

Seq Nbr: 1

Invoice Date Option

☒ Processing Date

☐ User Defined

Range Selection

☐ All ☒ Invoice ID

☐ Bill Cycle ☐ Cust ID

☐ Date Bill Added ☐ Bill Type

☐ Range ID ☐ Bill Source

☐ Public Voucher Number

From Business Unit: GRANT

To Business Unit: GRANT

From Invoice:

To Invoice:

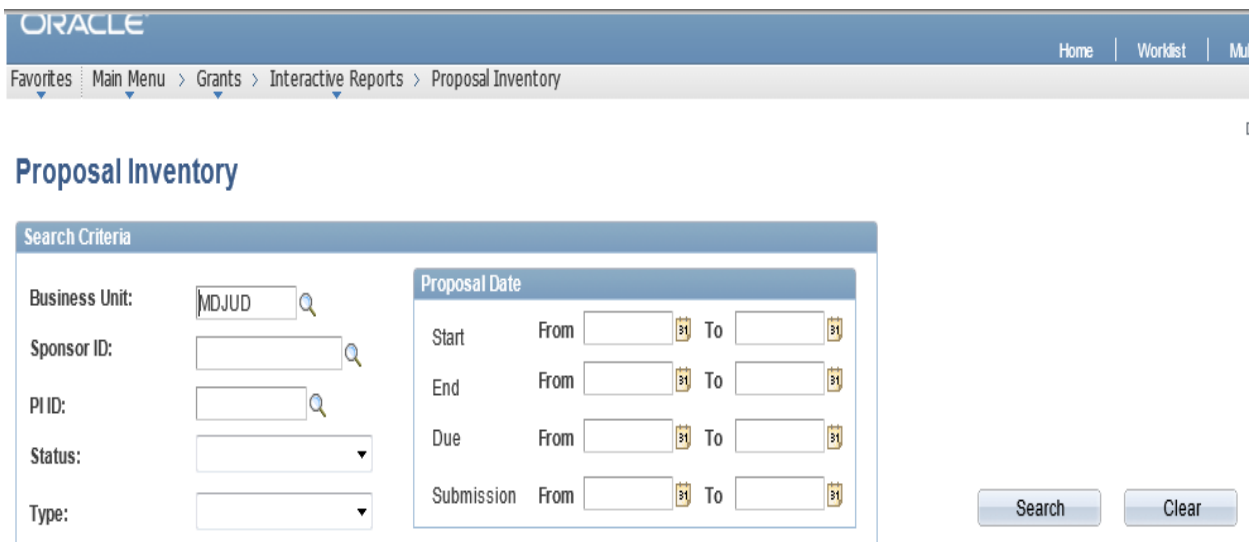
Grant Online Inquiries

Proposal Inventory

Explanation: Use the fields in the Search Criteria group box to select or enter the information for which you want to view an inventory of proposals.

Navigation: Grants, Interactive Reports, Proposal Inventory

Search Criteria:



The screenshot shows the Oracle Proposal Inventory search interface. At the top is the Oracle logo and a navigation bar with links for Home, Worklist, and My. Below the navigation bar is a breadcrumb trail: Favorites | Main Menu > Grants > Interactive Reports > Proposal Inventory. The main heading is "Proposal Inventory". Below this is a "Search Criteria" group box. It contains several fields: "Business Unit" with a text input containing "MDJUD" and a magnifying glass icon; "Sponsor ID" with a text input and a magnifying glass icon; "PI ID" with a text input and a magnifying glass icon; "Status" with a dropdown menu; and "Type" with a dropdown menu. To the right of these fields is a "Proposal Date" group box with four rows: "Start", "End", "Due", and "Submission". Each row has "From" and "To" date pickers. To the right of the "Search Criteria" group box are two buttons: "Search" and "Clear".

Search Criteria	
Business Unit:	<input type="text" value="MDJUD"/>
Sponsor ID:	<input type="text"/>
PI ID:	<input type="text"/>
Status:	<input type="text"/>
Type:	<input type="text"/>

Proposal Date	
Start	From <input type="text"/> To <input type="text"/>
End	From <input type="text"/> To <input type="text"/>
Due	From <input type="text"/> To <input type="text"/>
Submission	From <input type="text"/> To <input type="text"/>

Sample Inquiry Output:

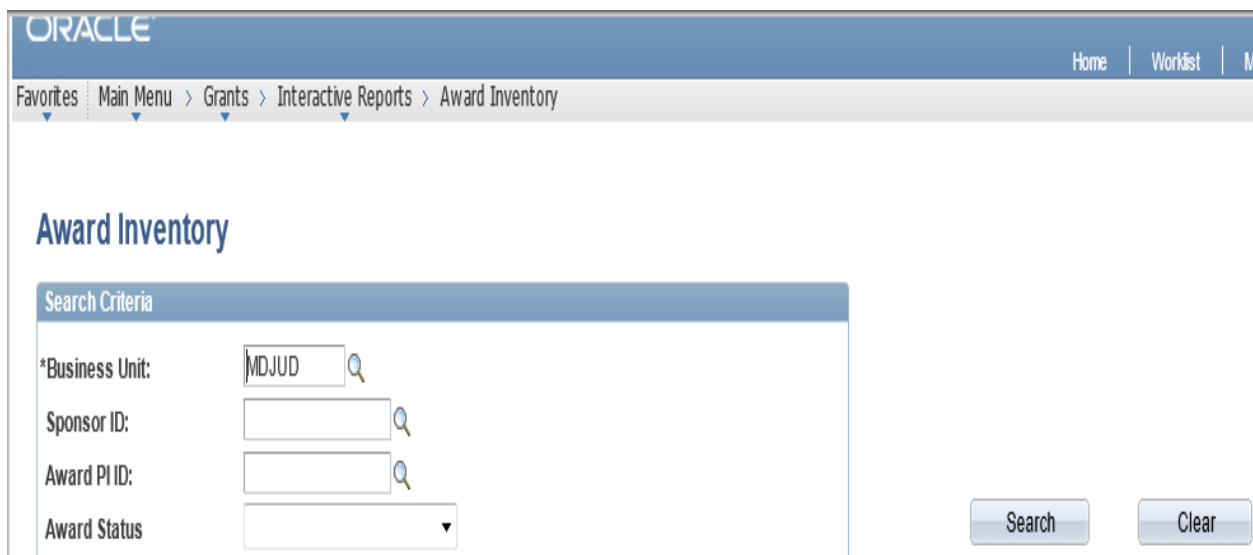
Details Personalize Find First 1-15 of 15 Last				
Proposal Inventory Info		More Info		
Proposal ID	Version ID	Title	Proposal PI	Sponsor
AAP-NEWTSTGRANT	V101	New Grant with Matching funds	PARKER,ALECIA	State Justice Institute
AAPTESTGRANT	V101	Training Grant for MACRO	PARKER,ALECIA	State Justice Institute
BAS-OPSC TRAINING	V101	OPSC Grant Training	STANSBURY,BRENDA	Maryland Highway Safety Office
DPTESTPROPOSAL	V101	TEST PROPOSAL	PARKER,ALECIA	State Justice Institute
GBTRAININGPROPOSAL	V101	Big Time Training Proposal	BARTON,R. GRAY	Bureau of Justice Assistance
GRANTDEMO-SHARE	V101	Grant Demo Share	PARKER,ALECIA	State Justice Institute
JGR-TRAINPROPOSAL	V101	Training Proposal	PARKER,ALECIA	State Justice Institute
JLMWORKFORCE PROPOSAL	V101	Workforce Development Services	STANSBURY,BRENDA	Bureau of Justice Assistance

Award Inventory

Explanation: Use the fields in the Search Criteria for Award Inventory group box to select or enter the information for which you want to view an inventory of proposals that have received funding.



Navigation: Grants, Interactive Reports, Award Inventory

Search Criteria:



The screenshot shows the Oracle GEARs interface. At the top is the Oracle logo and a navigation bar with links for Home, Worklist, and M. Below the navigation bar is a breadcrumb trail: Favorites > Main Menu > Grants > Interactive Reports > Award Inventory. The main content area is titled "Award Inventory". Below this title is a "Search Criteria" section with four input fields: "*Business Unit:" (containing "MDJUD"), "Sponsor ID:", "Award PI ID:", and "Award Status" (a dropdown menu). Each of the first three text input fields has a magnifying glass icon to its right. To the right of the search criteria section are two buttons: "Search" and "Clear".

Sample Inquiry Output:

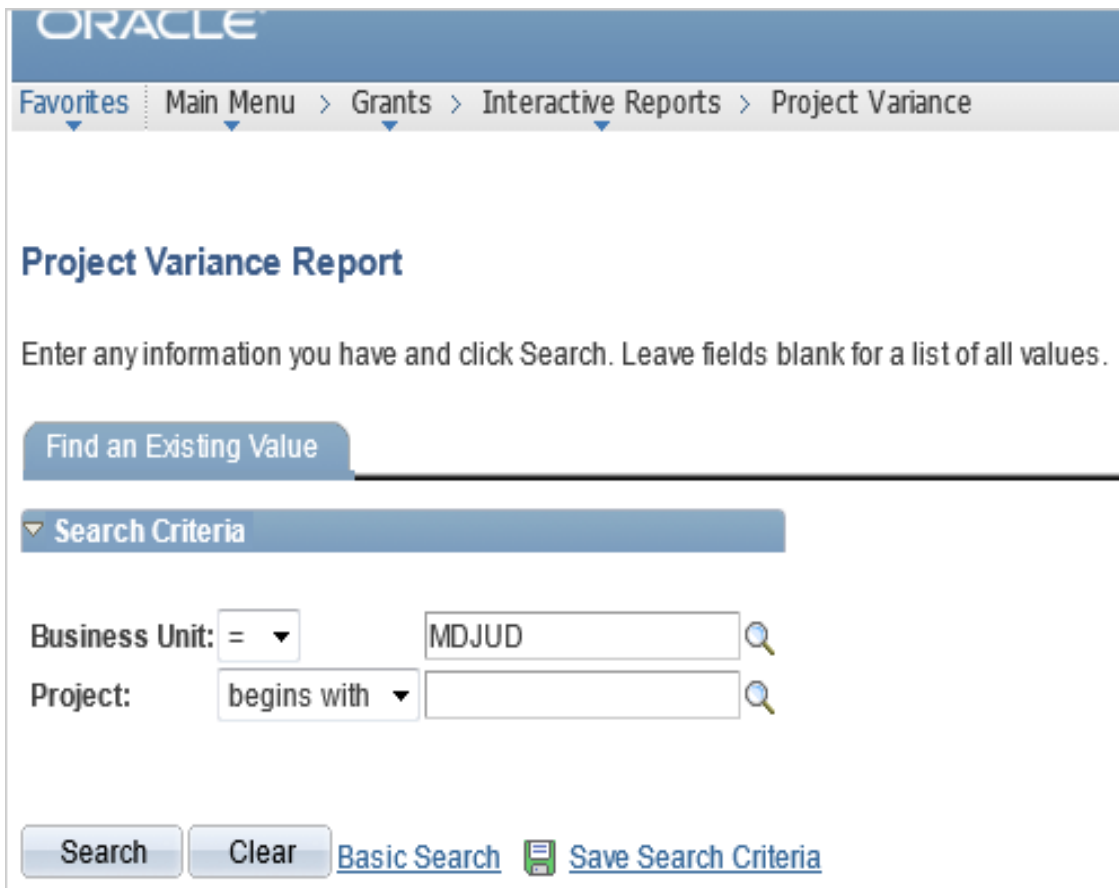
Details				Personalize Find   First 1-27 of 27 Last
Award Inventory Info		More Info		
Award ID	Sponsor	Award PI	Reference Award Number	
12SJIADR2	State Justice Institute	KELLEHER,LYNNE	12SJIADR2	▲
AAPTESTGRANT1	State Justice Institute	PARKER,ALECIA		
DPTESTPROPOSAL1	State Justice Institute	PARKER,ALECIA	DPTESTPROPOSAL1	
JGR-TRAINPROPOSAL	State Justice Institute	PARKER,ALECIA	JGR-TRAINPROPOSAL	
RAWMEDIATION1	State Justice Institute	PARKER,ALECIA		≡
SJI-09-N-156	State Justice Institute	KELLEHER,LYNNE	SJI-09-N-156	
SJI-13-N-028	State Justice Institute	KELLEHER,LYNNE	SJI-13-N-028	
TRN-DEMO-GRTAWD	State Justice Institute	KELLEHER,LYNNE		
sponsoraward#	State Justice Institute	PARKER,ALECIA	sponsor special num	
11SHAAACO	Maryland Highway Safety Office	ARMIGER,SUSAN	11SHAAACO	
11SHAHOCO	Maryland Highway Safety Office	BARTON,R. GRAY	11SHAHOCO	
BAS-OPSC-TRAINING1	Maryland Highway Safety Office	STANSBURY,BRENDA		

Grant Project Variance

Explanation: Select the project information that you want to retrieve—either cost-sharing or noncost-sharing. Select the from and to dates for which you want to retrieve information.

Navigation: Grants, Interactive Reports, Project Variance

Search Criteria:



The screenshot shows the Oracle Project Variance Report search interface. At the top, the Oracle logo is visible. Below it, a breadcrumb trail reads: Favorites > Main Menu > Grants > Interactive Reports > Project Variance. The main heading is "Project Variance Report". Below the heading, a text prompt says: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a "Find an Existing Value" button followed by a text input field. Below this is a "Search Criteria" section with a dropdown arrow. Under "Search Criteria", there are two rows of search fields. The first row is for "Business Unit:" with a dropdown set to "=", a text input field containing "MDJUD", and a magnifying glass icon. The second row is for "Project:" with a dropdown set to "begins with", an empty text input field, and a magnifying glass icon. At the bottom, there are four buttons: "Search", "Clear", "Basic Search", and "Save Search Criteria".

ORACLE

Favorites > Main Menu > Grants > Interactive Reports > Project Variance

Project Variance Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit: = MDJUD

Project: begins with

Search Clear Basic Search Save Search Criteria

Sample Inquiry Output:

Project Variance Report

Project Variance

Business Unit: MDJUD Project: DPTESTPROPG12A5 Currency: USD

Lookup Analysis Group

☐ Cost Sharing ☒ Non Cost Sharing

Lookup Dates

From Date: 01/01/1900 To Date: 06/12/2013

Retrieve

Details							Personalize Find 1-2 of 2 Last	
Project Variance Info		More Variance Info						
Account	Account Description	Budget	Actuals	Encumbered	Pre Encumbered			
1 0000	All Accounts	10,000.000	0.000	0.000			+	-
2 0872	Outside Services - Consulting	0.000	1,000.000	0.000			+	-

Course Summary



Congratulations!

You have successfully completed the *REP300-PC/CA/GM Reports* course. In this course, you have learned how to:

- Generate and review various Projects, Contracts and Grants Reports

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (<mailto:gearstraining@mdcourts.gov>).